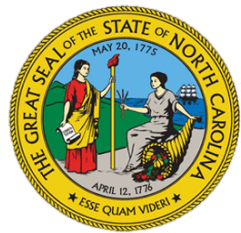


North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Inventory Deprecation, Transfer, and Distribution User Guide

Version 7

February 15, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at
https://ncgov.servicenowservices.com/csm_vaccine

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021

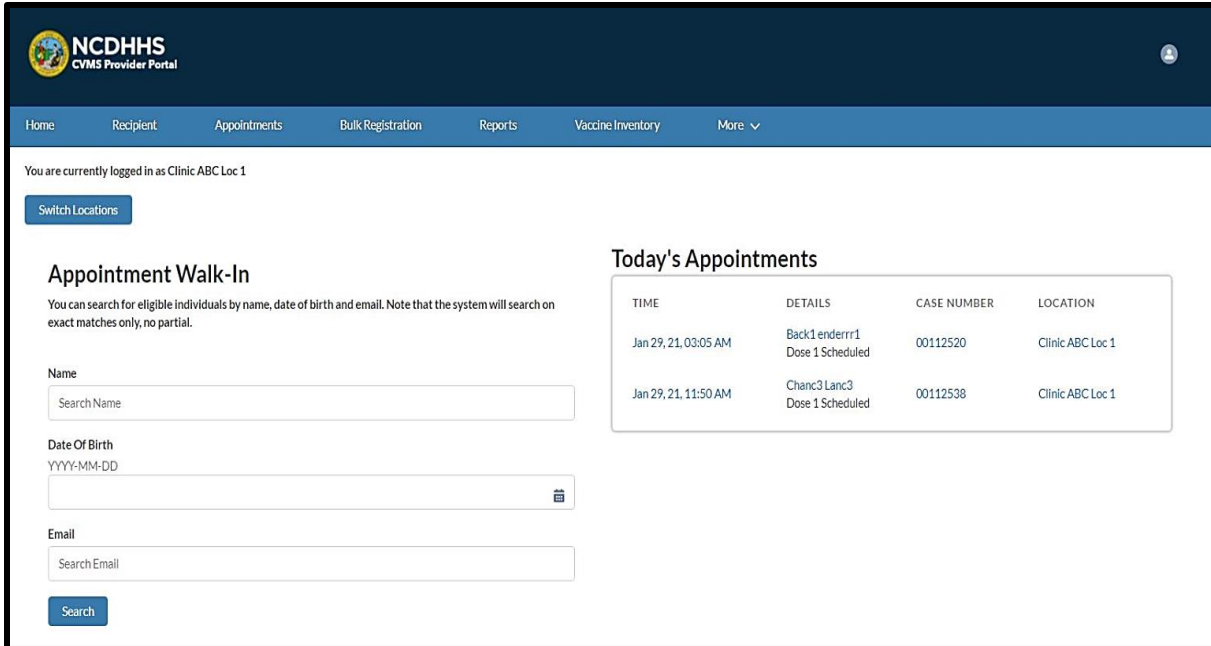
3. You will receive an e-mail with your username and temporary password to log into the portal

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Inventory Deprecation, Transfer, and Distribution Process Overview

Overview



The screenshot shows the NCDHHS CVMS Provider Portal. The header includes the NCDHHS logo and navigation links: Home, Recipient, Appointments, Bulk Registration, Reports, Vaccine Inventory, and More. A user is logged in as 'Clinic ABC Loc 1'. The main content area is divided into two sections. On the left, 'Appointment Walk-In' includes a search form with fields for Name, Date Of Birth (YYYY-MM-DD), and Email, and a Search button. On the right, 'Today's Appointments' displays a table of scheduled appointments.

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 29, 21, 03:05 AM	Back1 enderrrr1 Dose 1 Scheduled	00112520	Clinic ABC Loc 1
Jan 29, 21, 11:50 AM	Chanc3 Lanc3 Dose 1 Scheduled	00112538	Clinic ABC Loc 1

To provide NCDHHS with an accurate picture of the COVID-19 vaccine inventory at your disposal, you will need to update the CVMS Provider Portal with COVID-19 vaccine inventory reductions, or deprecations. These actions typically involve:

1. COVID-19 Vaccine Wastage
2. COVID-19 Vaccine Insufficient Quantity
3. COVID-19 Vaccine Transfer and Redistribution Processes

The processes discussed in this training guide are primarily for the **Healthcare Location Managers** profile.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers (Internet Explorer or Edge non-Chromium are not supported)
- Log into the CVMS Provider portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Key Terms

Wastage

Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.

Transfer

Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

Spoilage

Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.

Vaccine Deprecation

Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines is reduced by the amount of COVID-19 vaccines administered, wasted, or considered insufficient.

Vaccine Inventory Shipment Details

Vaccine Inventory Shipment Details may include manufacturer name, lot number, serial number, and National Drug Code (NDC).

Redistribution

Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

Insufficient Quantity

COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.

When to declare in CVMS a COVID-19 Vaccine Inventory Deprecation



When a COVID-19 vaccine is wasted

Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.

Once submitted, the Healthcare Provider Location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.



When a COVID-19 vaccine vial has insufficient quantity

Healthcare Location Manager accesses the Vaccine Inventory and inputs that a vial from that inventory has yielded an insufficient quantity (any time a vial yields less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type)



When a COVID-19 vaccine is to be redistributed/transferred to another provider location

Healthcare Location Manager enters the COVID-19 Vaccine Redistribution/Transfer Request into the CVMS Provider Portal with details such as Primary Location Secondary Location, lot number, and quantity to redistribute/transfer. The approved redistribution/transfer is reflected as an order for the Secondary Location.

The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory Record auto-created, but the quantity is noted as "in transit".

Secondary Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available".

COVID-19 Vaccine Wastage

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 vaccine inventory management guidelines, you will want to document **ALL CASES of COVID-19 VACCINE WASTAGE** in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 vaccines.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



Audience

Healthcare
Location Manager

Step 2 of 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

- 1. Click **WASTE** at the top of the page
- 2. After clicking **WASTE**, you will be directed to the **VACCINE WASTAGE SURVEY FORM**

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Settings

Table

Refresh

Print

Filter

	Vac...	Accou...	Prod...	To...	D...	D...	Expira...	Date a...	Lot	Status	Usage ...	Create...
1	111Deliv...	Clinic AB...	Pfizer-Bi...	1	0	0	1/15/202...	1/15/202...	1	Complete		1/15/202...

Audience

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Location Manager

Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory Hyperlink.

Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 vaccine inventory waste.

- 1. Check the **BOX** for the **APPROPRIATE ROW(S)**
- 2. Click **NEXT** at the bottom of the page
- 3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**

Audience

Healthcare
Location Manager

Tips

You will be able to report a Partial or Full Vaccine shipment wastage on the next page.

HomeRecipientAppointmentsReportsBulk RegistrationVaccine InventoryMore

Previous

Report Waste

Please select the vaccines for which you would like to report a wastage event. The information will only have to be entered once for all vaccines selected.

<input type="checkbox"/>	Vaccine Inventory... ▾	Product Name ▾	Account Name ▾	Status ▾	Doses Available ▾	Serial Number ▾	Lot ▾
<input type="checkbox"/>	Delivery 12/02/2020 - v2	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	77	31415926535	LT-23451
<input type="checkbox"/>	Delivery 12/02/2020	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	0	1123581321	LT-12345
<input checked="" type="checkbox"/>	Delivery 12/04/2020	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	140	2468101214	LT-02241989
<input type="checkbox"/>	E2E Testing			Available	186	90	90

Next



Step 4 of 5: Complete the Vaccine Wastage Survey form

Report Waste

* Date Wastage Occurred

Dec 7, 2020

* Doses Wasted

☐ Entire vaccine inventory wasted

* Reason for Waste

None

Description

* Reason for Waste

None

None

Broken Vial/syringe

Vaccine drawn into syringe but not administered

Lost or unaccounted for vaccine

Non vaccine product (e.g. IG, HBIG, Dil)

Open vial but all doses not administered

Unaccounted

1. Populate the required **REPORT WASTE FIELDS**:

1. Date Wastage Occurred
2. Doses Wasted
3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.
4. Reason for Waste

2. You may populate the **OPTIONAL FIELDS** if desired

3. Before submitting the form, **CONFIRM** that all entered details are correct

4. Once you are ready to submit the form, click **NEXT**

5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

Audience

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Location Manager

Step 5 of 5: Submit the Vaccine Wastage Survey form

The **VACCINE WASTAGE RECORD** is now submitted, and your COVID-19 Vaccine Inventory Record will be automatically updated.

- 1. Click **FINISH**
- 2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE WASTAGE SURVEY FORM PAGE**

HomeRecipientAppointmentsReportsBulk RegistrationVaccine InventoryMore

Previous

Report Waste

Wastage event for the chosen vaccines have been created.

Finish

Audience

Healthcare
Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Wastage Record displayed on the All Wastage List View.

COVID-19 Vaccine Insufficient Quantity

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 Vaccine Inventory Management Guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE INSUFFICIENT QUANTITY** events in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Insufficient Quantity will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Insufficient Quantity events include any time less than the CDC standard doses are obtained from a vial for that specific vaccine manufacturer.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



Audience

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Location Manager

Step 2 of 5: Click Insufficient Quantity at the top of the page

At the top of the page, you will see the different actions you can take to manage your COVID-19 Vaccine Inventory Records. The **ALL VACCINE INVENTORY LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

To record an Insufficient Quantity event:

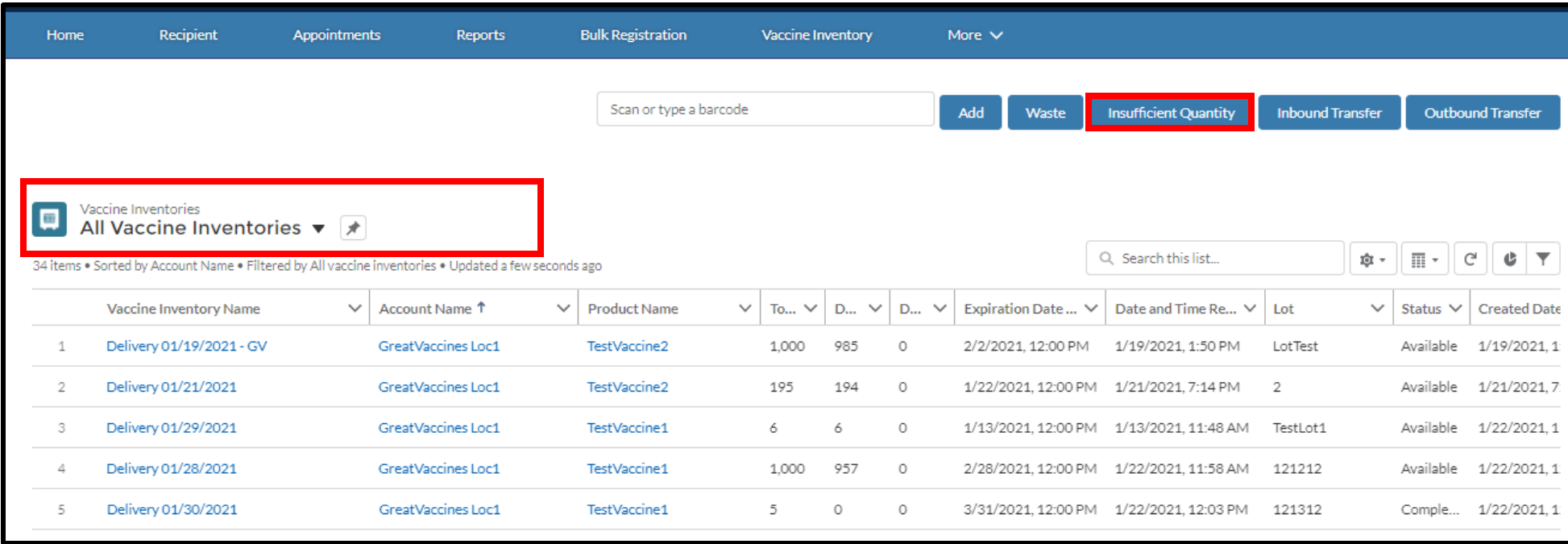
1. Click **INSUFFICIENT QUANTITY** at the top of the page
2. After clicking **INSUFFICIENT QUANTITY**, you will be directed to the **VACCINE INSUFFICIENT QUANTITY** page

Audience

Healthcare
Location Manager

Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory hyperlink.



Home Recipient Appointments Reports Bulk Registration Vaccine Inventory More ▾

Scan or type a barcode Add Waste **Insufficient Quantity** Inbound Transfer Outbound Transfer

Vaccine Inventories
All Vaccine Inventories ▾ ↗

34 Items • Sorted by Account Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list... ⚙️ 📄 ↺ ⌂ 🔍

	Vaccine Inventory Name ▾	Account Name ↑ ▾	Product Name ▾	To... ▾	D... ▾	D... ▾	Expiration Date... ▾	Date and Time Re... ▾	Lot ▾	Status ▾	Created Date
1	Delivery 01/19/2021 - GV	GreatVaccines Loc1	TestVaccine2	1,000	985	0	2/2/2021, 12:00 PM	1/19/2021, 1:50 PM	LotTest	Available	1/19/2021, 1
2	Delivery 01/21/2021	GreatVaccines Loc1	TestVaccine2	195	194	0	1/22/2021, 12:00 PM	1/21/2021, 7:14 PM	2	Available	1/21/2021, 7
3	Delivery 01/29/2021	GreatVaccines Loc1	TestVaccine1	6	6	0	1/13/2021, 12:00 PM	1/13/2021, 11:48 AM	TestLot1	Available	1/22/2021, 1
4	Delivery 01/28/2021	GreatVaccines Loc1	TestVaccine1	1,000	957	0	2/28/2021, 12:00 PM	1/22/2021, 11:58 AM	121212	Available	1/22/2021, 1
5	Delivery 01/30/2021	GreatVaccines Loc1	TestVaccine1	5	0	0	3/31/2021, 12:00 PM	1/22/2021, 12:03 PM	121312	Comple...	1/22/2021, 1

Step 3 of 5: Find the appropriate vaccine(s) on the list

Once you are directed to the **VACCINE INSUFFICIENT QUANTITY** page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report an insufficient quantity.

- 1. Check the **BOX** for the appropriate **VACCINE INVENTORIES**
- 2. Click **NEXT** at the bottom of the page
- 3. After clicking **NEXT**, you will see the **VACCINE INSUFFICIENT QUANTITY SURVEY FORM**

HomeRecipientAppointmentsBulk RegistrationReportsVaccine InventoryMore

Previous

Vaccine Insufficient Quantity

Please select the vaccines for which you would like to create an insufficient quantity event. The information will only have to be entered once for all vaccines selected.

<input type="checkbox"/>	Vaccine Inventory Name	Product Name
<input type="checkbox"/>	Grace Moderna First Dose Inventory	Moderna (10 MDV) COVID-19
<input type="checkbox"/>	Grace Pfizer 4.1 Inventory	Pfizer-BioNTech (6 doses/vial)
<input type="checkbox"/>	Delivery 01/15/2021	Pfizer-BioNTech (5 doses/vial)
<input type="checkbox"/>	New Grace Pfizer BioTech Inventory for testing abcdef	TestVaccine1
<input type="checkbox"/>	Pfizer 6doses Delivery 02/10/2021	Pfizer-BioNTech (6 doses/vial)
<input type="checkbox"/>	Delivery 01/26/2021	Pfizer-BioNTech (5 doses/vial)
<input checked="" type="checkbox"/>	Lot 1234567	Pfizer-BioNTech (5 doses/vial)
<input type="checkbox"/>	R4.1 release inventory	Pfizer-BioNTech (25 MDV) COVID-19

<input type="checkbox"/>	Moderna Delivery 02/09/2021	Moderna (10 MDV) COVID-19 Va...	Clinic ABC Loc 1	Available	198	Lot2021
<input type="checkbox"/>	Delivery 02/02/2021	TestVaccine1	Clinic ABC Loc 1	Available	1,099	test
<input type="checkbox"/>	Grace Moderna Inventory	Pfizer-BioNTech (5 doses/vial) (19...	Clinic ABC Loc 1	Available	35	990
<input type="checkbox"/>	SomTestInventoryUAT3-2	TestVaccine2	Clinic ABC Loc 1	Available	80	63241645
<input type="checkbox"/>	Delivery 01/26/2021	Pfizer-BioNTech (5 doses/vial) (19...	Clinic ABC Loc 1	Available	4	11101
<input type="checkbox"/>	Test0125-Delivery 01/25/2021	Moderna (10 MDV) COVID-19 Va...	Clinic ABC Loc 1	Available	997	L-88
<input type="checkbox"/>	Delivery 01/27/2021	TestVaccine1	Clinic ABC Loc 1	Available	17	3252342
<input type="checkbox"/>	Grace Pfizer Inventory	Pfizer-BioNTech (5 doses/vial) (19...	Clinic ABC Loc 1	Available	133	909
<input type="checkbox"/>	Expiration 1/13/2021 8:30	Pfizer-BioNTech (5 doses/vial) (19...	Clinic ABC Loc 1	Available	77	100

Next

Audience

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Location Manager

Tips

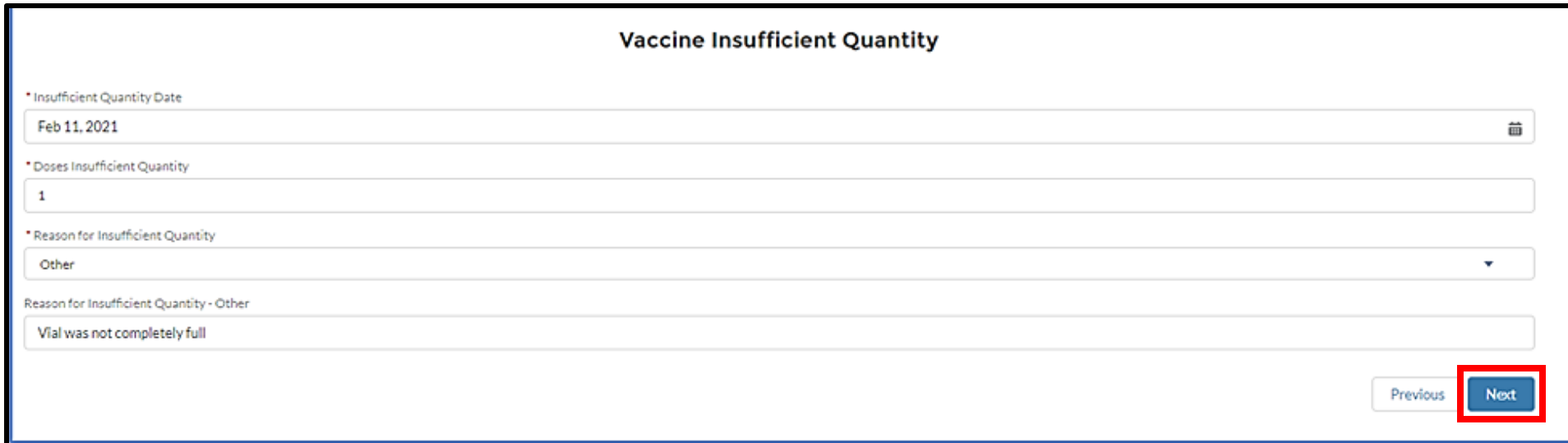
You will only be able to record insufficient quantity events for the same vaccine product if you choose to select more than one Vaccine Inventory Record.

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Step 4 of 5: Complete the Vaccine Insufficient Quantity Survey form

1. Populate the required **REPORT INSUFFICIENT QUANTITY FIELDS**:
 1. Insufficient Quantity Date
 2. Doses Insufficient Quantity
 3. Select the appropriate reason from the drop-down
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**



The screenshot shows a web form titled "Vaccine Insufficient Quantity". It contains the following fields:

- * Insufficient Quantity Date**: A date picker showing "Feb 11, 2021".
- * Doses Insufficient Quantity**: A text input field containing the number "1".
- * Reason for Insufficient Quantity**: A dropdown menu with "Other" selected.
- Reason for Insufficient Quantity - Other**: A text input field containing "Vial was not completely full".

At the bottom right, there are two buttons: "Previous" and "Next". The "Next" button is highlighted with a red square.

Audience

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Tips

For **Doses Insufficient Quantity**, select the number of doses missing from each vial.

Step 5 of 5: Submit the Vaccine Insufficient Quantity Survey form

The **VACCINE INSUFFICIENT QUANTITY RECORD** is now submitted, and your COVID-19 Vaccine Inventory Records will be automatically updated.

- 1. Click **FINISH**
- 2. After you click **FINISH**, you will see the Vaccine Insufficient Quantity record displayed on the **ALL INSUFFICIENT QUANTITY LIST VIEW**

HomeRecipientAppointmentsBulk RegistrationReportsVaccine InventoryMore

Previous

Vaccine Insufficient Quantity

Insufficient quantity event for the chosen vaccines have been created.

Finish

Insufficient Quantities

All Insufficient Quantities

48 items • Sorted by Created Date • Filtered by All insufficient quantities • Updated 2 minutes ago

Search this list...

Settings

Grid

Refresh

Print

Filter

	Insufficient ...	Vaccine Inventory	Insuffic...	Dos...	Reason for Insufficient Quantity	Reason for Insufficient Quantity - ...	Created Date
1	INSUFF-00097	Delivery 02/12/2021	2/15/2021	1	Moderna (9 doses obtained from vial, expected 10)		2/15/2021, 11:29 AM
2	INSUFF-00096	Grace Moderna First Dose Inventory	2/15/2021	1	Moderna (9 doses obtained from vial, expected 10)		2/15/2021, 11:29 AM

Audience

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Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Insufficient Quantity record displayed on the **All Insufficient Quantity List View**.

COVID-19 Vaccine Inbound Transfer or Redistribution

Step 1 of 4: Processing an Inbound Redistribution/Transfer

If you are **RECEIVING** an **INBOUND REDISTRIBUTION/TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound redistribution/transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound redistributions/transfers from the **ADD INVENTORY PROCESS**.

- 1. From the home page, click **VACCINE INVENTORY**
- 2. Click **INBOUND TRANSFER**

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Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

	Vac...	Accou...	Prod...	To...	D...	D...	Expira...	Date a...	Lot	Status	Usage ...	Create...
1	111Deliv...	Clinic AB...	Pfizer-Bi...	1	0	0	1/15/202...	1/15/202...	1	Complete		1/15/202...

Audience

Healthcare
Location Manager

Tips

Inbound redistributions/transfers are not processed from the Add Inventory Process.

Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** Records that are incoming redistributions/transfers to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

- 1. Select the correct **VACCINE INVENTORY** Record
- 2. Click **NEXT**

Audience

Healthcare
Location Manager

Tips

Identify Vaccine Inventory Records for inbound redistribution/transfer.

HomeRecipientAppointmentsReportsBulk RegistrationVaccine InventoryMore

Previous

Please select the incoming vaccine transfer for which you are confirming receipt.

Vaccine Inventory Name	Product ID	Account Name	Status	Incoming Transfer Doses	Serial Number
<input type="radio"/> Delivery 12/19/2020	Pfizer-BioNTech (195 MDV) COVI...	Quality Hospital (Location 1)	Incoming Transfer in Transit	100	

Next

Step 3 of 4: Complete the Inbound Transfer form

Once you select the Vaccine Inventory Record, you will see the Vaccine Inventory details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound redistribution/transfer is now processed.

- 1. Enter the **DATE RECEIVED**
- 2. Enter the **DOSES RECEIVED**
- 3. Click **NEXT**

Audience

Healthcare
Location Manager

HomeRecipientAppointmentsReportsBulk RegistrationVaccine InventoryMore

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Name : Delivery 12/19/2020

Product Name : Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

NDC # :

Lot : 123456745

Expiration Date : 12/19/2021, 12:00 PM

Serial Number :

Account : Quality Hospital (Location 1)

* Date Received

Dec 21, 2020

* Doses Recieved

100

Incoming Doses Quantity : 100

PreviousNext

Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound redistribution/transfer is processed and added to your inventory.

- 1. Click **FINISH**



The screenshot shows a web application interface with a blue navigation bar at the top containing links: Home, Recipient, Appointments, Reports, Bulk Registration, Vaccine Inventory, and More (with a dropdown arrow). The main content area has a light gray background. In the top right corner of the main area, there is a blue button labeled 'Previous'. In the center of the main area, there is a white box with the text 'Record has been saved successfully.' In the bottom right corner of the main area, there are two buttons: a light gray 'Previous' button and a blue 'Finish' button. The 'Finish' button is highlighted with a red rectangular border.

Audience

Healthcare
Location Manager

Tips

Complete the inbound transfer form by clicking Finish.

COVID-19 Vaccine Outbound Transfer or Redistribution

Overview of an Outbound Redistribution/Transfer

Redistribution and transfer requests require **NCDHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements. There are three scenarios that transfer requests will fall under.

1. If a provider requests a redistribution between two CVMS Provider locations within the same organization, who have an existing redistribution agreement, **THE TRANSFER IS AUTOMATICALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
2. If a provider requests a redistribution between two locations within the same organization, but there is no existing redistribution agreement, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
3. If a provider requests a transfer to a location that is outside their location's organization, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**

Audience

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Location Manager

Step 1 of 10: Locate Inventory for Redistribution/Transfer

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request through the CVMS Provider Portal.

- 1. From the Home Page, click the **VACCINE INVENTORY** tab
- 2. Select the correct **VACCINE INVENTORY** Record that you want to redistribute/transfer to a different location / organization

Audience

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Location Manager

Tips

Selecting the **OUTBOUND TRANSFER** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

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Recipient

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Bulk Registration

Reports

Vaccine Inventory

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

4 items • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Print

Filter

	Vaccine Inven...	Product Name	Lot	Total Doses	Doses Ava...	Expiration Da...	Date and Tim...	Usage (First o...	Account N..
1	Delivery 02/09/2...	Pfizer-BioNTech ...	123	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	First Dose only (...)	Clinic ABC L
2	Grace Pfizer Inve...	Pfizer-BioNTech ...	909	100	133	2/28/2021, 12:0...	1/12/2021, 11:3...		Clinic ABC L

Step 2 of 10: Creating a Transfer/Redistribution Request

- 1. From the Vaccine Inventory Record, select the **RELATED** tab
- 2. Locate the **ORDERS** related list and click **NEW**

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Vaccine Inventory

Grace Pfizer Inventory

Request Transfer/Redistribution

Change Status

Edit

Account

Total Doses

Extra Doses

Doses Available

Doses Administered

Doses Wasted

Clinic ABC Loc 1

100

100

133

49

5

DETAILS

RELATED

Orders (0)

New

Appointments (6+)

Appointment	Contact Name	Status	Vaccine Status
00112886	3550retest1 user	Closed	Dose 1 Administered
00112834	reji8 ayod8	Closed	Dose 1 Administered
00112689	Grace Wix	Closed	Dose 2 Administered
00112166	Tester Test	Closed	Dose 2 Administered
00112165	Peggy Bundy	Closed	Dose 2 Administered
00112161	Julius Rand	Closed	Dose 1 Administered

View All

Audience

Healthcare
Location Manager

Tips

Selecting the **REQUEST TRANSFER / REDISTRIBUTION** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 3 of 10: Edit the Order Transfer Record

New Order: Transfer or Redistribution

Transfer Information

* Account Name: Clinic ABC Loc 1

* Status: Submitted

Vaccine Receiver: Unable to find Vaccine Receiver ☒

* Dose Transferred: 100

* Vials Transferred: 20

* Reason for Request: Mass Vaccination

* Order Start Date: 2/12/2021

Associated Vaccine Inventory: Grace Pfizer Inventory

Buttons: Cancel, Save & New, Save

A pop-up window will appear titled **NEW ORDER: TRANSFER OR REDISTRIBUTION** for you to fill out.

1. Enter your own location for **ACCOUNT NAME**
2. Select **SUBMITTED** for status
3. If the receiving provider / location is in your organization, enter the name of the receiving provider in the **VACCINE RECEIVER** field
4. If the receiving provider / location is outside your organization, select the **UNABLE TO FIND VACCINE RECEIVER** button
5. Enter the desired doses to be transferred
6. Enter the desired vials to be transferred
7. Enter the reason for the request
8. Enter the desired start date for the transfer

Audience

Healthcare
Location Manager

Tips

The doses transferred must be less than the doses currently available on the selected Vaccine Inventory Record.

The Vials Transferred number must be equal to the Doses Transferred divided by the standard doses per vial for the vaccine inventory (either 5 or 6 for Pfizer, and 10 for Moderna).

Save request as a Draft Status to review all information prior to submitting. Transfer request will be reviewed once the request status has been changed to submitted.

Step 4 of 10: Submit the Order Transfer Record

New Order: Transfer or Redistribution

Receiving COVID-19 Enrolled Provider Information

Receiving Location Name (CVMS)
Test Location

Receiving Location Street Address
123 Main Street

Receiving Location City
Raleigh

Receiving Location Phone
123-456-7890

Receiving Location Zip
12345

Receiving Location Primary Vaccine Coord
Vax Coordinator

Receiving Location Primary Coord Email
vax.j.coordinator@mailinator.com

Sending Provider to check box below to confirm adherence to each requirement:

☒ Adherence to all Requirements

Requirement 1:
Sending Provider and Receiving Provider location names listed above match exactly how they appear in the COVID-19 Vaccine Management System (CVMS) Provider Enrollment Portal.

Cancel Save & New Save

Scroll down within the **NEW ORDER: TRANSFER OR REDISTRIBUTION** pop-up window.

1. If the receiving provider / location is in your organization, do not enter any information in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section
2. If the receiving provider / location is outside your organization, fill in the Location Name, Street Address, City, Phone Number, Zip Code, and Vaccine Coordinator's Name and Phone Number for the receiving provider
3. Review all of the listed requirements for initiating a transfer / redistribution request
4. Select the **ADHERENCE TO ALL REQUIREMENTS** checkbox
5. Click **SAVE**

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Tips


You must fill in **ALL** fields in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section if you selected the **UNABLE TO FIND VACCINE RECEIVER** checkbox at the top of the form.

Step 5 of 10: Confirm the Redistribution/Transfer Request was Submitted

- 1. On the **ORDERS** related list from the Vaccine Inventory Related Tab, the new Order redistribution or transfer request will appear
- 2. If the status shows as **SUBMITTED** or **PROCESSING**, that indicates the redistribution or transfer is pending approval from NCDHHS Immunization Branch
- 3. If the status appears as **TRANSFER IN TRANSIT**, that indicates the transfer has been approved by NCDHHS Immunization Branch

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 Vaccine Inventory
Grace Pfizer Inventory

[Request Transfer/Redistribution](#)[Change Status](#)[Edit](#)

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
Clinic ABC Loc 1	100	100	133	49	5

DETAILS

RELATED

 Orders (1)

New

Order Number	Status	Vaccine Receiver	Dose Transferred
ORD-0000271	Submitted		100

View All

Step 6 of 10: Provide Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **SHIP YOUR VACCINE INVENTORY** to the receiving location.

As soon as the transfer is approved, the Healthcare Location Manager who initiated the transfer request will receive an automated email indicating the approval.

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Step 7 of 10: Provide Redistribution/Transfer Details

You can **UPDATE** the Order Transfer Record with the **ACTUAL SHIPMENT DETAILS** to support tracking of the shipment. The Order Transfer Record can be located via the Vaccine Inventory Record that is providing the inventory.

- 1. From the Home page, click the **VACCINE INVENTORY** tab
- 2. Select the correct **VACCINE INVENTORY** Record

Audience

Healthcare
Location Manager

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

4 items • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Filter

	Vaccine Inven...	Product Name	Lot	Total Doses	Doses Ava...	Expiration Da...	Date and Tim...	Usage (First o...	Account N..
1	Delivery 02/09/2...	Pfizer-BioNTech ...	123	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	First Dose only (...)	Clinic ABC I
2	Grace Pfizer Inve...	Pfizer-BioNTech ...	909	100	133	2/28/2021, 12:0...	1/12/2021, 11:3...		Clinic ABC I

Step 8 of 10: Open the Approved Redistribution/Transfer Request

- 1. Navigate to the **RELATED TAB**
- 2. Locate the Orders related list
- 3. Confirm that the Order is in **TRANSFER IN TRANSIT** status and click the **ORDER NUMBER** of the Transfer Request




Audience


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Tips

Review the Vaccine Receiver to confirm it is the correct record.



NCDHHS
CVMS Provider Portal

[Home](#) [Recipient](#) [Appointments](#) [Bulk Registration](#) [Reports](#) [Vaccine Inventory](#) [More](#) 


 Vaccine Inventory
Grace Pfizer Inventory


[Request Transfer/Redistribution](#) [Change Status](#) [Edit](#)

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
Clinic ABC Loc 1	100	100	33	49	5

DETAILS

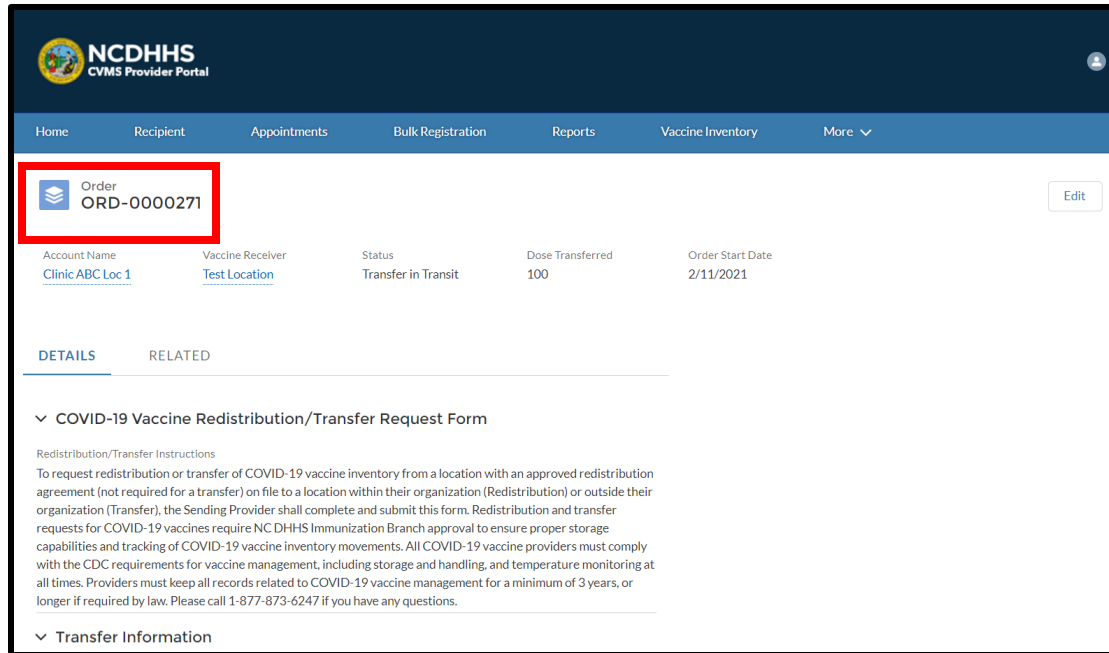
RELATED

 Orders (1) [New](#)

Order Number	Status	Vaccine Receiver	Dose Transferred	
ORD-0000271	Transfer in Transit	Test Location	100	

[View All](#)

Step 9 of 10: Update the Order Transfer Record



NCDHHS CVMS Provider Portal

Home Recipient Appointments Bulk Registration Reports Vaccine Inventory More ▾

Order
ORD-0000271 Edit

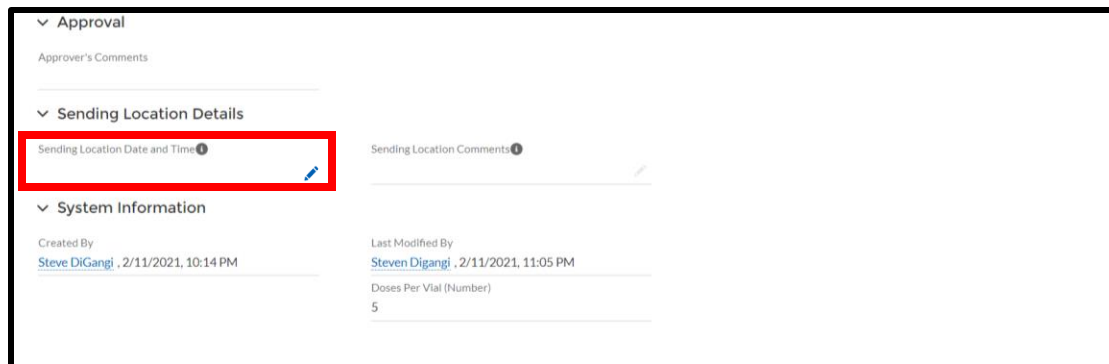
Account Name Clinic ABC Loc 1	Vaccine Receiver Test Location	Status Transfer in Transit	Dose Transferred 100	Order Start Date 2/11/2021
--------------------------------------------------	---------------------------------------------------	-------------------------------	-------------------------	-------------------------------

DETAILS RELATED

▼ COVID-19 Vaccine Redistribution/Transfer Request Form

Redistribution/Transfer Instructions
To request redistribution or transfer of COVID-19 vaccine inventory from a location with an approved redistribution agreement (not required for a transfer) on file to a location within their organization (Redistribution) or outside their organization (Transfer), the Sending Provider shall complete and submit this form. Redistribution and transfer requests for COVID-19 vaccines require NC DHHS Immunization Branch approval to ensure proper storage capabilities and tracking of COVID-19 vaccine inventory movements. All COVID-19 vaccine providers must comply with the CDC requirements for vaccine management, including storage and handling, and temperature monitoring at all times. Providers must keep all records related to COVID-19 vaccine management for a minimum of 3 years, or longer if required by law. Please call 1-877-873-6247 if you have any questions.

▼ Transfer Information



▼ Approval

Approver's Comments

▼ Sending Location Details

Sending Location Date and Time 1 Edit

Sending Location Comments 1

▼ System Information

Created By Steve DiGangi , 2/11/2021, 10:14 PM	Last Modified By Steven DiGangi , 2/11/2021, 11:05 PM
Doses Per Vial (Number) 5	

Once you have the **ORDER TRANSFER RECORD** open, you can provide the **SHIPMENT DETAILS REQUIRED**.

1. Scroll down to the **SENDING LOCATION DETAILS** section
2. Click the **PENCIL ICON** next to **SENDING LOCATION DATE AND TIME**

Audience

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Location Manager**

Step 10 of 10: Submit Shipment Details

Once you click edit, you will be able to update the record and save your changes.

1. Enter the **SENDING LOCATION DATE** and **TIME** when shipment was sent
2. Enter the **SHIPMENT TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
3. Click **SAVE**

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▼ Sending Location Details

Sending Location Date and Time ⓘ

Date

Time

Sending Location Comments ⓘ

▼ System Information

Created By

Steve DiGangi, 2/11/2021, 10:14 PM

Cancel

Save

Last Modified By

Steve DiGangi, 2/11/2021, 11:05 PM

Editing Order Redistribution or Transfer Requests

Transfer requests can still be **EDITED** while in **SUBMITTED** or **DRAFT** status.

- 1. Select the Vaccine Inventory Record that has a transfer request
- 2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **SUBMITTED** or **DRAFT** status
- 3. Click on the **EDIT** button
- 4. Make changes to the necessary fields and click **SAVE**

Audience

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Location Manager

CVMS Provider Portal

Home

Recipient

Appointments

Bulk Registration

Reports

More

Order

ORD-0000275

Edit

Account Name

Vaccine Receiver

Status

Dose Transferred

Order Start Date

Clinic ABC Loc 1

Submitted

10

2/12/2021

DETAILS

RELATED

COVID-19 Vaccine Redistribution/Transfer Request Form

Redistribution/Transfer Instructions

To request redistribution or transfer of COVID-19 vaccine inventory from a location with an approved redistribution agreement (not required for a transfer) on file to a location within their organization (Redistribution) or outside their organization (Transfer), the Sending Provider shall complete and submit this form. Redistribution and transfer requests for COVID-19 vaccines require NC DHHS Immunization Branch approval to ensure proper storage capabilities and tracking of COVID-19 vaccine inventory movements. All COVID-19 vaccine providers must comply with the CDC requirements for vaccine management, including storage and handling, and temperature monitoring at all times. Providers must keep all records related to COVID-19 vaccine management for a minimum of 3 years, or longer if required by law. Please call 1-877-873-6247 if you

Edit Order

minimum of 3 years, or longer if required by law. Please call 1-877-873-6247 if you have any questions.

Transfer Information

* Account Name

Clinic ABC Loc 1

* Status

Submitted

Vaccine Receiver

Search Accounts...

Unable to find Vaccine Receiver

☒

* Dose Transferred

10

* Vials Transferred

2

Cancel

Save & New

Save

Recalling Order Redistribution or Transfer Requests

The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top, there's a navigation bar with links: Home, Recipient, Appointments, Bulk Registration, Reports, and More. Below this, the main content area displays an order summary for 'ORD-0000272'. The order is in 'Processing' status. A red box highlights the 'Order' icon and the order number. Another red box highlights the 'Account Name' (Crimson Skies - Location 3), 'Vaccine Receiver' (Crimson Skies - Location 1), and 'Status' (Processing). Below the summary, there's a 'DETAILS' section with a 'RELATED' tab highlighted. Under the 'RELATED' tab, there's an 'Order History (5)' table and an 'Approval History (2)' table. The 'Approval History' table has a 'Recall' button highlighted in a red box.

Order Summary:

- Order: ORD-0000272
- Account Name: [Crimson Skies - Location 3](#)
- Vaccine Receiver: [Crimson Skies - Location 1](#)
- Status: Processing
- Dose Transferred: 10

Order History (5):

Date	Field	User	Original Value	New Value
2/11/2021, 10:44 PM	Record locked.	Nicholas TestCrimson		
2/11/2021, 10:44 PM	Created.	Nicholas TestCrimson		
2/11/2021, 10:44 PM	Price Book	Nicholas TestCrimson		Standard Price Book
2/11/2021, 10:44 PM	Submitted for Approval	Nicholas TestCrimson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2/11/2021, 10:44 PM	Status	Nicholas TestCrimson	Submitted	Processing

[View All](#)

Approval History (2):

Step Name	Date	Status	Assigned To
Review Transfer or Redistrib...	2/11/2021, 10:44 PM	Pending	Transfer and Redistribution A...
Approval Request Submitted	2/11/2021, 10:44 PM	Submitted	Nicholas TestCrimson

[View All](#)

Recall Button:

[Recall](#)

Transfer requests can be **RECALLED** while in **PROCESSING** status. The recall function is only used when transferring between two locations in the same organization that do not have an existing redistribution agreement (Scenario #2 from the **Overview of an Outbound Redistribution/Transfer** slide). In any other scenario, the Healthcare Location Manager should use the **EDIT** capability.






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1. Select the **VACCINE INVENTORY RECORD** that has a transfer request.
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **PROCESSING** status
3. Navigate to the **RELATED** tab on the Order Transfer Record
4. Scroll down to Approval History and click on **RECALL**
5. Add comments and click **RECALL**
6. **ORDER WAS RECALLED** will appear at the top of the screen

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Edge Chromium, or Safari to access CVMS
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not compatible with CVMS.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/21/2020	<ul style="list-style-type: none">• Initial document		Azalea Troche
2	1/10/2021	<ul style="list-style-type: none">• Removed any mention of the 2 CVMS Vaccine Support emails.• Added CVMS Hep Desk Portal information	1, 2, 7, 11, 15, 21, 34	Courtney Seward
3	1/13/2021	<ul style="list-style-type: none">• Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21. The CVMS Help Desk Portal screenshot was also added.	1, 21, 22	Courtney Seward
4	1/17/2021	<ul style="list-style-type: none">• Updated navigation bar.• Updated the terms for Redistribution and Transfer	6	Azalea Troche & Courtney Seward
5	1/21/2021	<ul style="list-style-type: none">• Added a TIP	21	Courtney Seward & Linda Wade
6	1/27/2021	<ul style="list-style-type: none">• Updated Navigation Bar screen shots to show reports tab	5,9,10,11,13,15,16,17,19,23,25,26,28,29,31,32,33,34	Kristin Clark
7	2/4/2021	<ul style="list-style-type: none">• Updated CVMS Help Desk Portal Screenshot	21,22	Courtney Seward
8	2/15/2021	<ul style="list-style-type: none">• Added Insufficient Quantity Definitions• Added Insufficient Quantity Section• Rewrote Inventory Transfer to match 4.1 Release methodology• Updated screenshots to match new branding	6, 7, 14-19, 25-38	Tabitha McKelvy Steve DiGangi Nicholas Rinz